



Copilot QuickStart for Dynamics 365

Enable faster, more informed actions across Dynamics 365 workflows

Activate, configure and deploy a Copilot Studio solution for targeted business workflows through a structured QuickStart engagement designed for Dynamics 365 and connected business applications.

Overview & Benefits

Turn AI initiatives into operational business outcomes

Many organizations struggle to move beyond AI experimentation due to unclear use cases, disconnected workflows, and integration complexity.

LevelShift's Copilot QuickStart helps organizations implement Copilot Studio solutions within Dynamics 365 and connected Business Applications environments through a structured implementation approach focused on operational value and rapid adoption.

The engagement is designed to identify practical business scenarios, configure Copilot agents, and help users bring AI into everyday workflows.

Key benefits

- **01 Accelerate AI readiness**
Validate Copilot readiness and environments for Business Applications adoption.
- **02 Automate business workflows**
Deploy Copilot agents for targeted ERP and operational processes.
- **03 Simplify AI implementation**
Launch focused AI initiatives without large-scale transformation efforts.
- **04 Build a scalable AI foundation**
Establish a framework for future enterprise AI expansion.
- **05 Integrate business applications**
Connect Dynamics 365 and approved business applications using standard APIs and connectors.
- **06 Support user adoption**
Provide training, adoption guidance, and hypercare support after deployment.

Core engagement capabilities



Enable Copilot environments

Validate prerequisites and configure development and production environments.



Configure conversational workflows

Design prompts, workflows, and interaction experiences aligned to business processes.



Validate and deploy solutions

Test workflows, responses, and automation logic before production rollout.



Discover and prioritize use cases

Identify business scenarios based on feasibility and operational impact.



Implement Copilot agents

Develop, test, validate, and deploy Copilot agents for prioritized workflows.



Support user adoption

Provide training, adoption guidance, and post-deployment support.

Implementation approach

01

Enable Copilot

Assess environment readiness and activate Copilot capabilities.

02

Configure Copilot agents

Develop and validate Copilot agents for prioritized business workflows.

03

Deploy and support solutions

Execute go-live activities, user validation, and hypercare support.



QuickStart package options

Defined scope: This QuickStart does not include custom AI model development, large-scale data cleansing, data migration, system re-architecture, licensing costs, or ongoing managed services.

Base Package

- Set up Copilot environments
- One production use case implementation
- One pre-built bonus Business Applications agent
- Structured QuickStart engagement aligned for rapid deployment

Extended Package

- Enable Copilot capabilities
- Two production use case implementations
- One pre-built bonus Business Applications agent
- Expanded scope for additional workflow automation scenarios

Deep Business Applications expertise

Strong experience across Microsoft business applications and enterprise workflows.



Pre-built Copilot accelerators

Reusable frameworks designed to speed up Copilot adoption.



Why LevelShift?

Proven implementation experience

Track record delivering business process modernization initiatives.



Structured implementation methodology

Delivery approach aligned to scalable AI adoption.

